



look
forward to
retirement!

Iowa Department of Administrative Services
Retirement Investors' Club (RIC)

Service Credit Purchase Form

If you qualify, you may request to move money from your RIC 457 employee contribution account to IPERS while you are working for the State, for the purpose of purchasing eligible IPERS credits. This is a nontaxable transfer. Once you terminate from state employment, your 401(a) employer match money may also be used.

Personal Information

Name _____ Social Security # _____
Last First MI
Address _____ Birth Date _____
City _____ State _____ Zip _____
Telephone (work) _____ Telephone (home) _____

Transfer Amount

*Designate the exact
dollar amount you
wish to transfer
from your RIC
accounts.*

Please note: Active state employees may request a transfer from their RIC 457 account(s) only. Terminated employees have the option to use both 457 and 401(a) assets for a transfer.

AIG Retirement	<input type="checkbox"/> 457 \$ _____
Hartford	<input type="checkbox"/> 457 \$ _____
ING	<input type="checkbox"/> 457 \$ _____
Nationwide	<input type="checkbox"/> 457 \$ _____
_____	<input type="checkbox"/> 457 \$ _____
Inactive Provider	

Participant Signature

I acknowledge that I understand the plan-to-plan transfer option and that the information provided is correct.

X _____
Signature Date

Instructions

1. Contact IPERS and request a cost estimate
2. Complete the *IPERS Rollover/Direct Transfer* form and this form
3. Send both completed forms to RIC (address and fax information below)

RIC signs the *IPERS Rollover/Direct Transfer* form (keeps a copy) and sends the original to the participant. RIC then sends a transfer request letter to the provider. **The provider makes the transfer check payable to: IPERS FBO (employee's name), sends the check to the employee, and a copy to RIC.**

4. Return the check and the *IPERS' Rollover/Direct Transfer* form to IPERS

State of Iowa Retirement Investors' Club ■ Iowa Department of Administrative Services
Human Resources Enterprise ■ 1305 E. Walnut ■ Hoover Building, Level A ■ Des Moines, IA 50319
515-281-8677 ■ 515-281-5102 (fax) ■ <http://das.hre.iowa.gov/ric.html>